FEATURES OF BUILD SW 05-02

Note: *DS-EIS-EOAS 01-00-0131 Note Custom Fields Required Not Enforced was removed from Build SW 05-02 and therefore is not included in EIS Production. It will be included in a future build. I also added Request 3.) (See below) which will allow Start/End Dates for Other IDs. This should have been included in the Release SW 05-02 notes that were sent out last Thursday, but was left out.*

1.) Request: DS-EIS-EOAS 01-00-0107 Password expiring without notice. If users don't access the system for months and the password expires they have no option to renew the password.

FIX:

Fixed the password logic so that the user is given 7 chances to change the password after it expires (every 90 days). Each time the user enters EIS the number of chances decreases by one if the password is not changed. If the user does not change it within the 7 chances the password will expire permanently and assistance from the helpdesk will be required..

2.) Request: DS-EIS-EOAS 01-00-0113 Users requesting for the Default Page from People List or My Events to be the Address List page

FIX:

Users will be directed to the Address list page when clicked on people list page links/My Events list page links. Previously the users were directed to the demographics page. Made Changes so that the user is shown the Address List Page. Demographics page will be accessible through show menu on Address page.

3.) Request: DS-EIS-EOAS 01-00-0072 There is currently no capability to capture start and end dates for other identifiers. Apparently these fields exist in the database, but are not 'loadable' from the People Other IDs screen. We would like to have these added.

FIX: Incorporated the Start and End dates in the People Other IDs page.
The user can now enter the start and end dates on the add page and update the same in the general page. Overlap is checked based on ID Type, Source, Value and Start/End Dates. The user is prompted with an error if overlapping record exists

4.) Request: DS-EIS-PART 2.6 13-04-0060 Default End Date
Each Service Population should have the ability to have the Note End Date default or not. A Flag should be available to the Administrator at the time of the Note type creation that would allow the Note End Date to default to the Start Date if the flag is set. The default for the End Date should be the same as the Start date for the note. IT SHOULD NOT BE THE SYSTEM DATE.

FIX:
Those setting up notes can have the end date default to the start date. SP Leads for each area can make these decisions. MR = Terry Sandusky, MH = Margaret Burke, Children's = Lori Geiger.

5.) Request: DS-EIS-EOAS 01-00-0114 Sort not maintaining in My Events List
When going from page to page (clicking Next) on the My Event –My Clients list the sort was not maintaining on the second page.

Fix: The default sort is maintained as you move from one grouping to another (one page to another and back).

6.) Request: **DS-EIS-EOAS 01-00-0115 When clicking on My Reports on My Preferences to open the report parameters dialog the system is bringing up two parameters dialogs one on top of the other. The only way out is to x out of the screen which boots you off EIS.**

Fix: Fixed the error so that the system doesn't bring up two parameter dialogs one on top of the other.

7.) Request: **DS-EIS-EOAS 01-00-0022 Modify In-Box ticklers to include client names.**

Fix: The client name will now appear in the In-Box ticklers.

8.) Request: DS-EIS-EOAS 01-00-0095 Export to Excel functionality from all list pages.

Fix: Eis Users will now have the ability to Export and Save the data included on any list/grid page to an Excel Spreadsheet. A Save to XLS button will appear on each list/grid page. Internet setting may have to be readjusted to allow this functionality.

The following steps will help you to utilize the Save XLS feature.

Step 1:
Open any list/grid page in EIS and Click the Save XLS button

If you get the following screen call the TechSupport Helpdesk at 287-8400 and we may need to make some adjustments to your internet settings.

Most people will get this screen.

Step 2: Make any change to the spreadsheet, such as go to any column border and double click it to modify the width of the column. The column will widen to accommodate the data it holds.
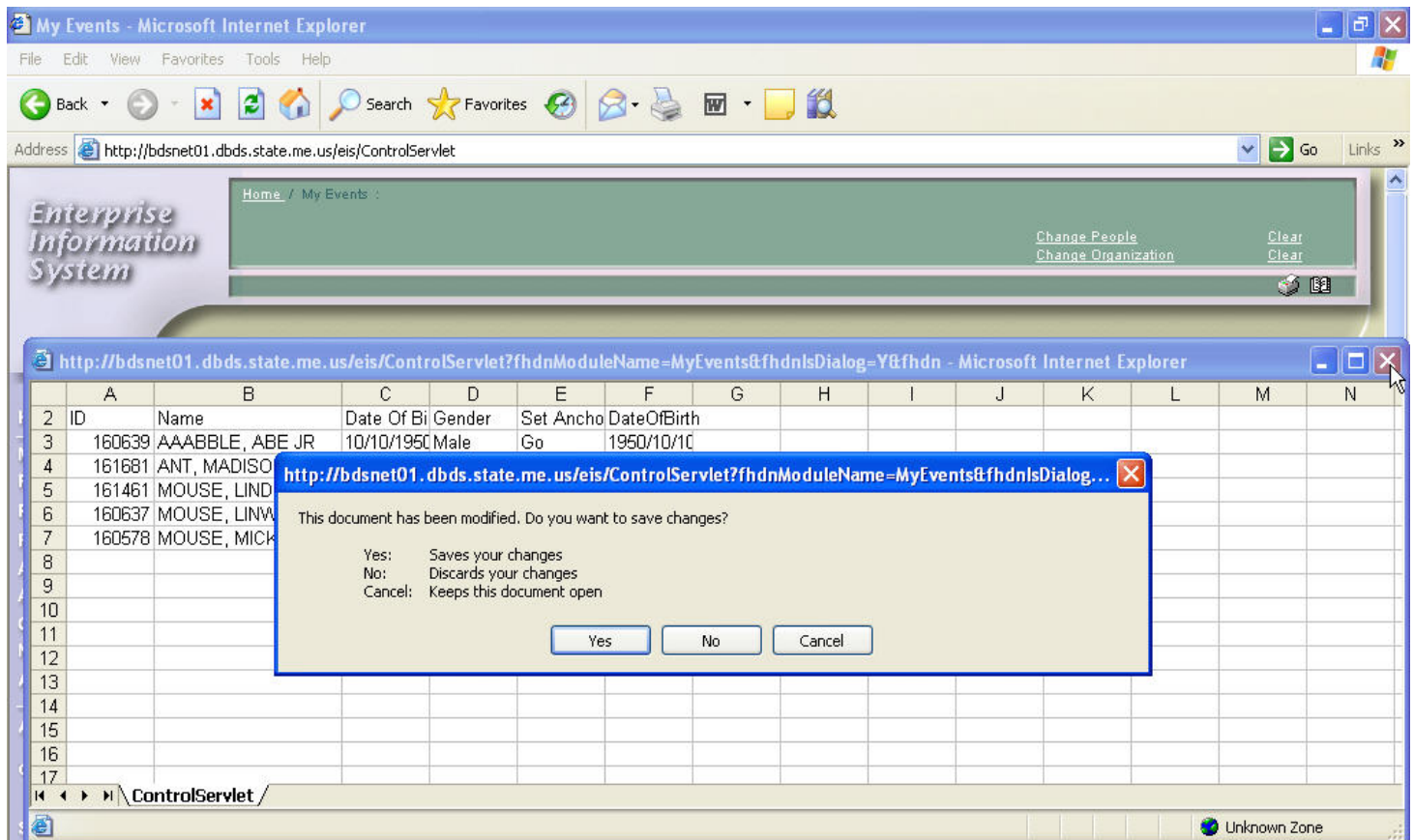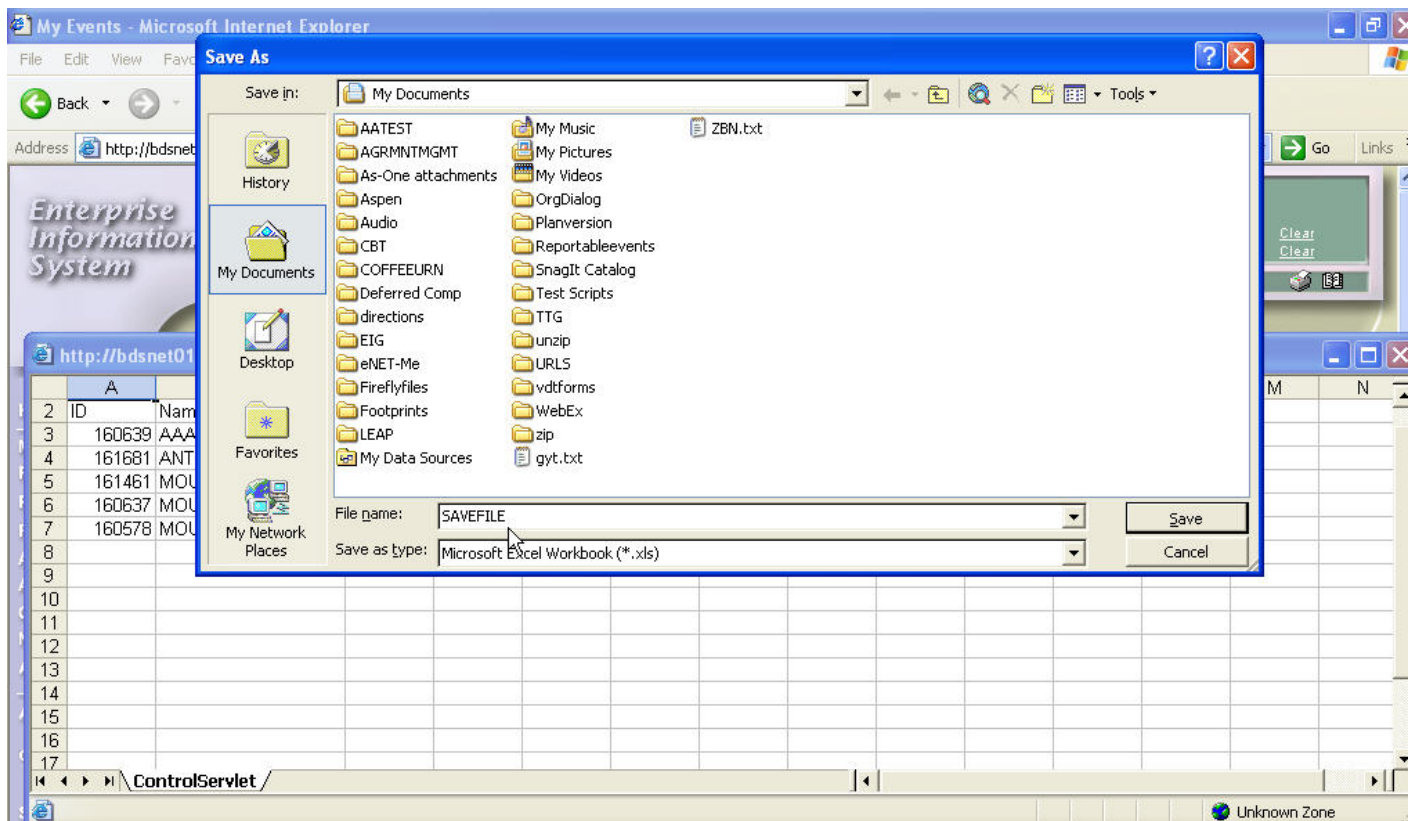
Step 3: Click the Red X in the upper right hand corner of the Excel Spread sheet and a Dialog message box will appear to allow you to Save, Not Save or Cancel.
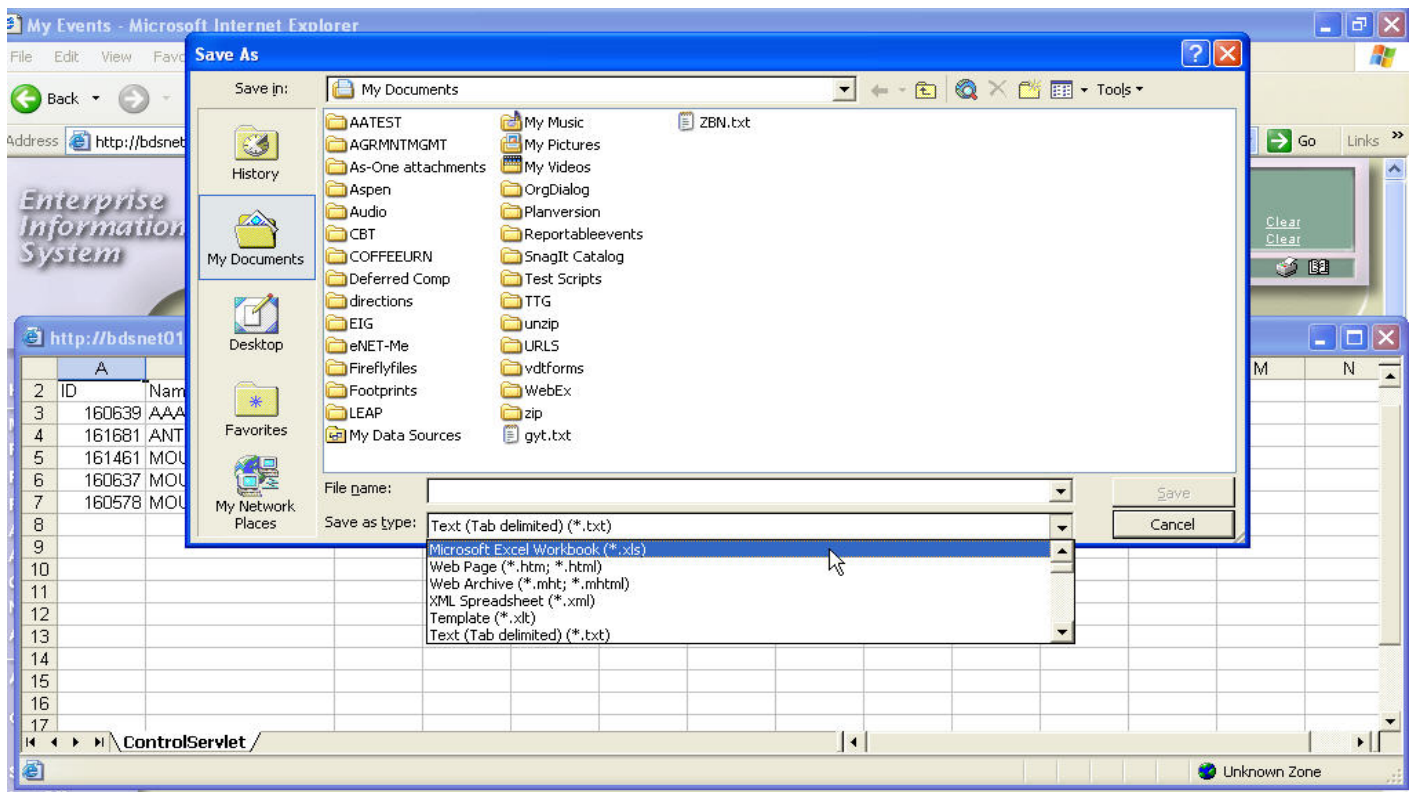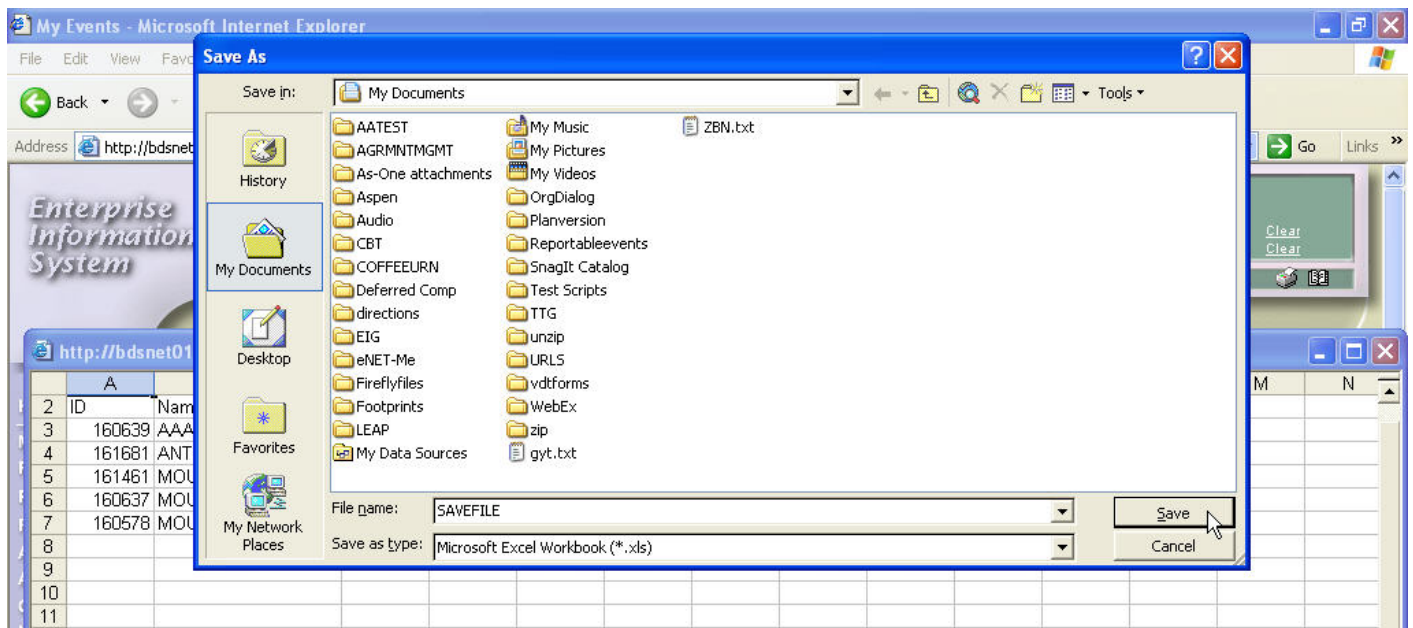

Step 4: Click the Save button, and it the Save as Type: drop down choose Microsoft Excel Workbook(*xls)
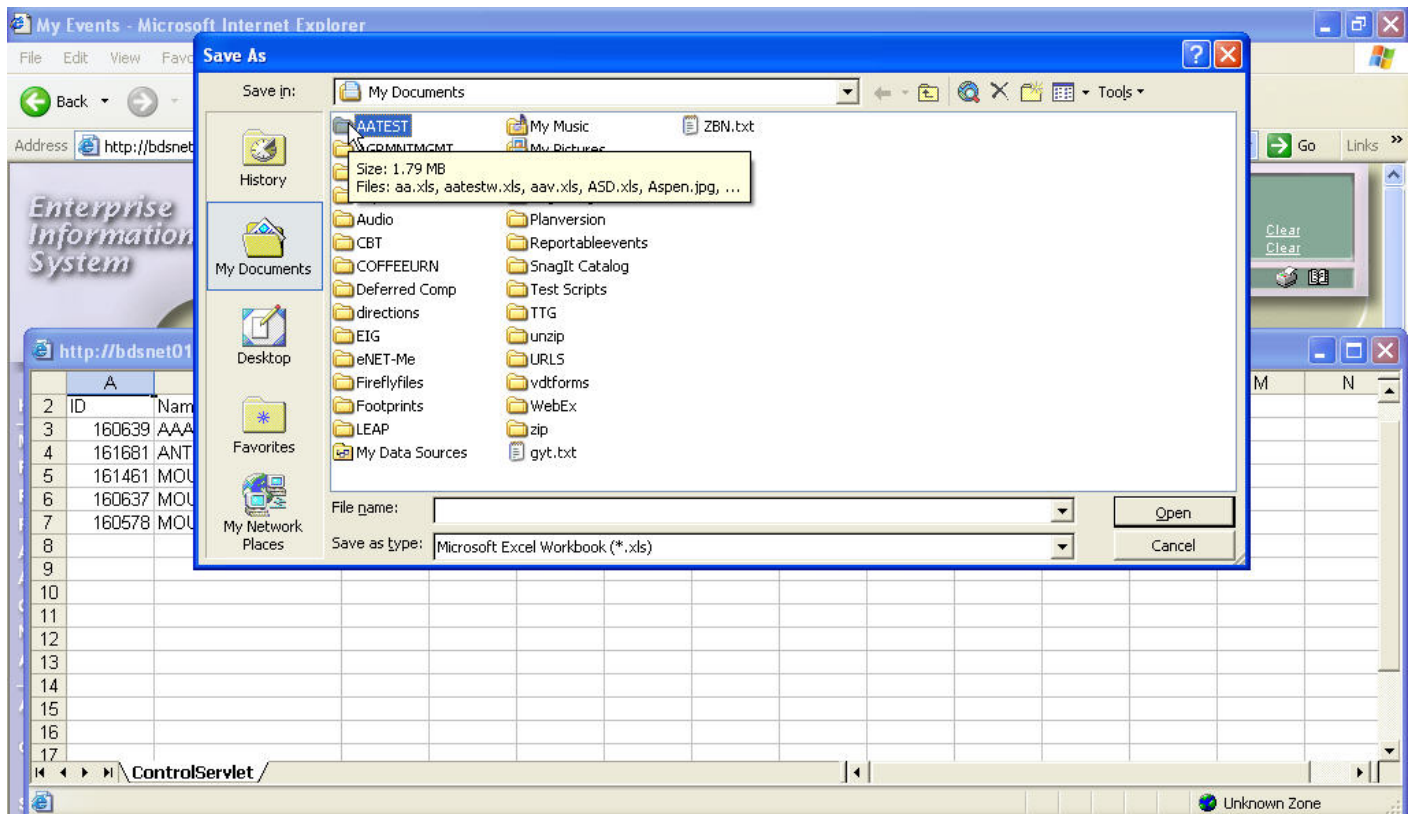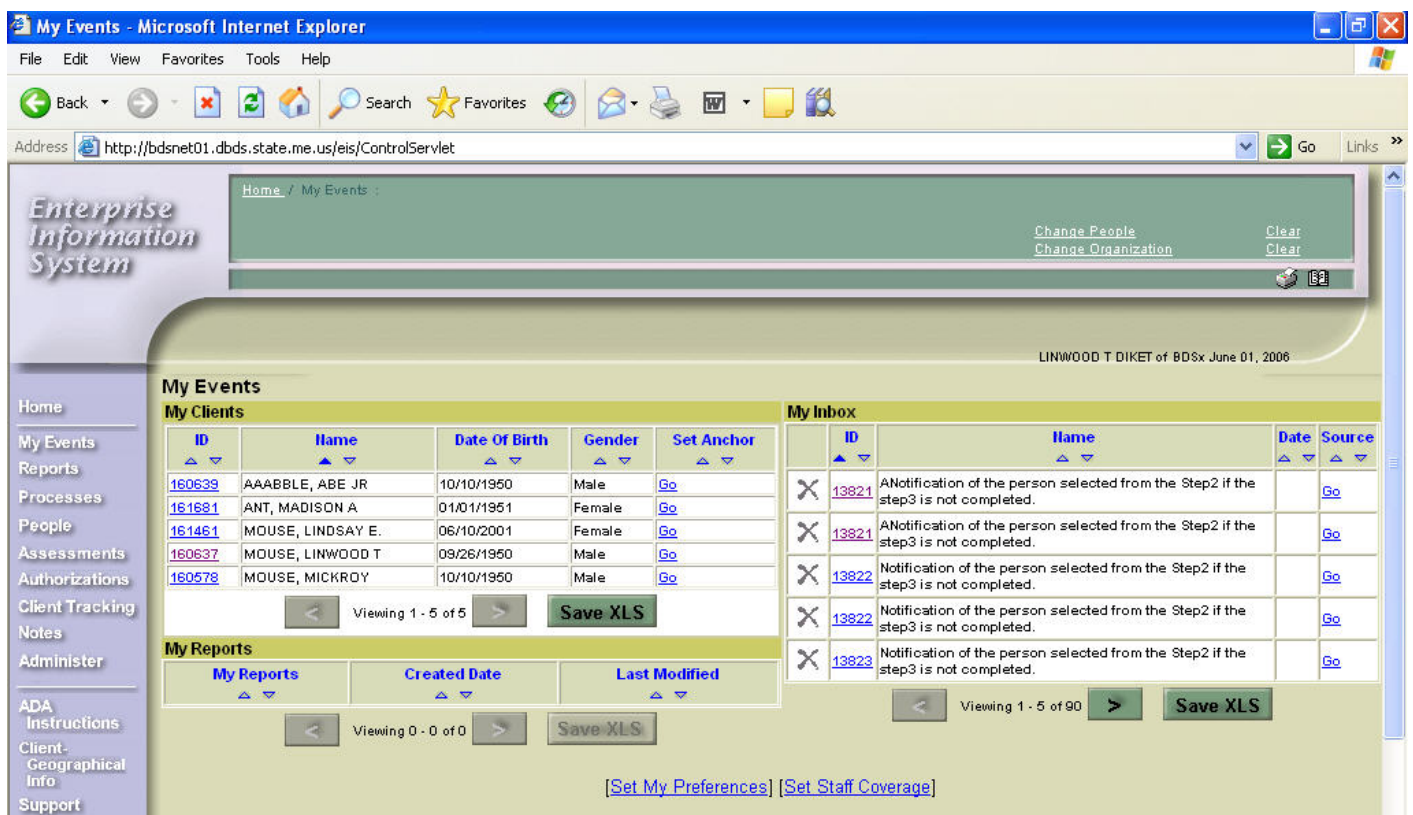
Step 5: Choose a folder on your computer to save the file to. Here I have chosen the AATEST folder.

Step 6: Enter a File Name: I named my file SAVEFILE.

Step 7: Click the Save button to save the SAVEFILE to a Microsoft Excel Workbook in your designated drive or folder.

You will return to the List/Grid page that you started on.   You should wait a couple of seconds to let the page refresh before moving on to your next activity in EIS.